



# Dementia Care Aware and Age-Friendly Recognition: *An FQHC Case Study*

Speakers:

**Michael Goldrich, MD**

Specialty Medical Director – Geriatrics, LifeLong Medical Care

**Kelly McCutcheon Adams, MSW, LICSW**

Institute of Healthcare Improvement

**Nicole Korp, MS**

Institute of Healthcare Improvement

**Moderator: Anna Chodos, MD, MPH**

Executive Director at Dementia Care Aware, Division of Geriatrics, UCSF



University of California San Francisco | May 27, 2026





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# Logistics

Please use the chat and Q&A functions to enter your questions throughout.

A recording and materials will be available on **DementiaCareAware.org**.

CE/CME information will be available at the end of the hour.



# Today's speakers



**Moderator**

**Anna Chodos, MD, MPH**  
Executive Director,  
Dementia Care Aware  
Division of Geriatrics, UCSF



**Presenter**

**Michael Goldrich, MD**  
Specialty Medical Director -  
Geriatrics,  
LifeLong Medical Care



**Presenter**

**Kelly McCutcheon Adams,  
MSW, LICSW**  
Senior Director,  
Institute for Healthcare  
Improvement



**Presenter**

**Nicole Korp, MS**  
Project Manager,  
Institute for Healthcare  
Improvement

# Learning Objectives

After this session, learners will be able to:

- Describe the role of mentation within the 4Ms Framework and its relevance to dementia screening in ambulatory care settings.
- Explain how Age-Friendly Health System recognition can serve as a foundation for implementation of cognitive health practices in primary care.
- Apply implementation strategies for integrating structured dementia screening into an age-friendly clinical setting.



# Institute for Healthcare Improvement



# Age-Friendly Health Systems: Evidence-Based Care for All Older Adults

May 27, 2026

Age-Friendly Health Systems is an initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA).

[IHI.org/AgeFriendly](https://IHI.org/AgeFriendly)

# Our Mission

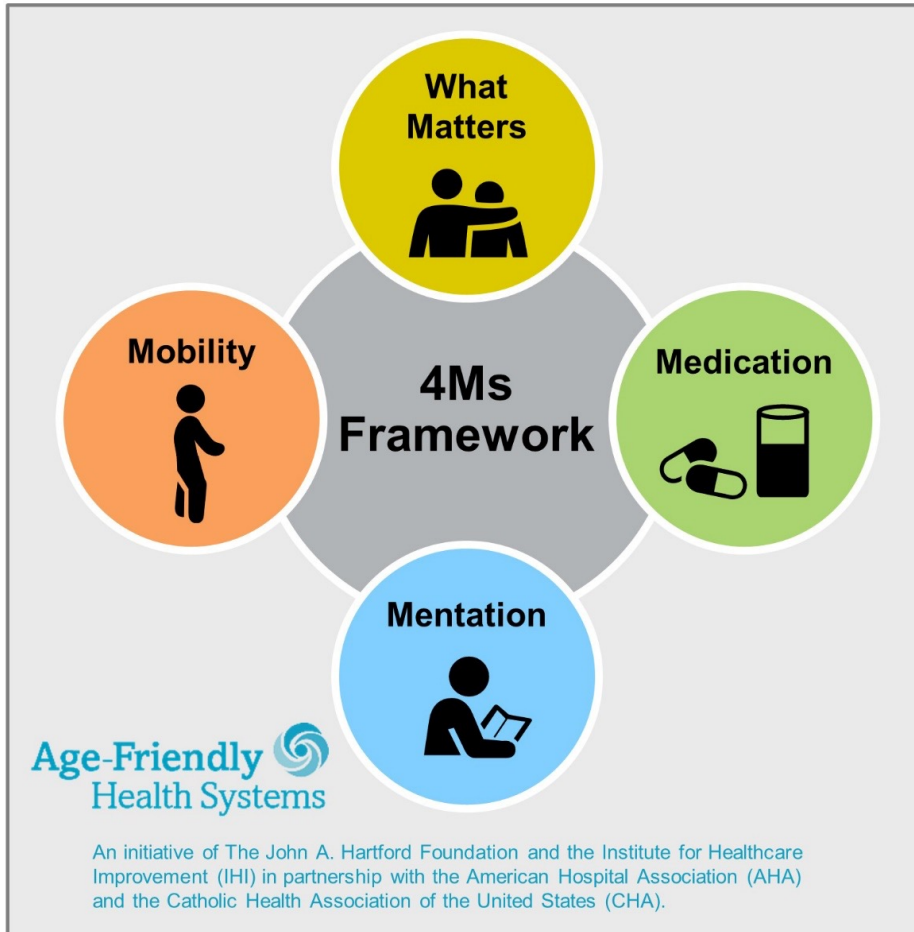
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Build a movement so **all care** with older adults is **age-friendly care**:

- Guided by an essential set of evidence-based practices (4Ms);
- Causes no harms; and
- Is consistent with What Matters to the older adult and their family.



# The 4Ms of Age-Friendly Care



## What Matters

Know and align care with each older adult's specific health outcome goals and care preferences including, but not limited to, end-of-life care, and across settings of care.

## Medication

If medication is necessary, use Age-Friendly medication that does not interfere with What Matters to the older adult, Mobility, or Mentation across settings of care.

## Mentation

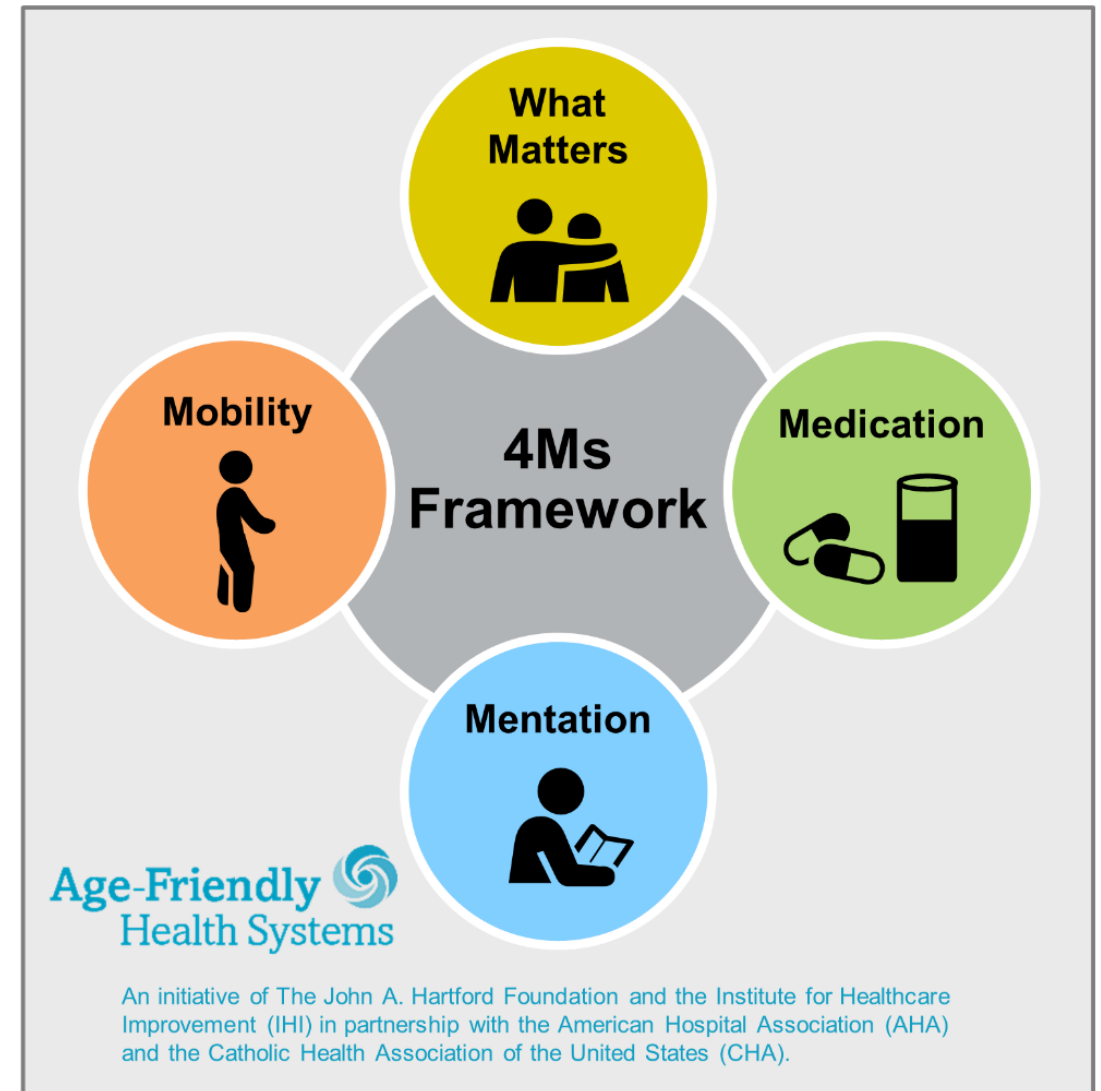
Prevent, identify, treat, and manage dementia, depression, and delirium across settings of care.

## Mobility

Ensure that older adults move safely every day in order to maintain function and do What Matters.

# Why the 4Ms?

- Represents core health issues for older adults
- Builds on strong evidence base
- Simplifies and reduces implementation and measurement burden on systems while increasing effect
- Components are synergistic and reinforce one another



For related work, this graphic may be used in its entirety without requesting permission.  
Graphic files and guidance at [ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)

# Join the Movement, Recognition, and Providing 4Ms Care

# Download Guidance for Your Care Setting



Age-Friendly Health Systems:

## Guide to Using the 4Ms in the Care of Older Adults in Hospitals and Ambulatory Care Practices

Spring 2024  
[ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)



This content was created especially for  
**Age-Friendly Health Systems**

An initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with The American Geriatrics Society (AGS) and the Catholic Health Association of the United States (CHA).



Age-Friendly Health Systems:

## Guide to Recognition for Geriatric Surgery Verification Hospitals

June 2022  
[ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)



This content was created especially for  
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Age-Friendly Health Systems:

## Guide to Care of Older Adults in Nursing Homes

Spring 2024  
[ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)



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Age-Friendly Health Systems:

## Guide to Using the 4Ms in the Care of Older Adults in the Convenient Care Clinic

February 2023  
[ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)



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**Age-Friendly Health Systems**

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Age-Friendly Health Systems:

## Guide to Recognition for Geriatric Emergency Department Accredited Sites

July 2024  
[ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)



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**Age-Friendly Health Systems**

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Age-Friendly Health Systems:

## Guide to Care of Older Adults in Home Health Care

January 2025  
[ihi.org/AgeFriendly](http://ihi.org/AgeFriendly)



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**Age-Friendly Health Systems**

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# Two Levels of Recognition

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## *Participant (Level 1)*

Teams have completed a 4Ms Care Description to [afhs@ihi.org](mailto:afhs@ihi.org) to outline how they will assess, document, and act on all 4Ms.

## *Committed to Care Excellence (Level 2)*

Teams have achieved level 1 and have submitted at least three months of counts of the number of older adults that received care that included all 4Ms.

[Recognition overview video](#)

[Find your setting-specific Care Description](#)



# Two Levels of Recognition from IHI



5,983

Hospitals, practices, convenient care clinics, nursing homes, and home health care organizations have described how they are putting the 4Ms into practices



2,929\*

Hospitals, practices, convenient care clinics, nursing homes, and home health care organizations shared the count of older adults reached with 4Ms care for at least three months

*\*Age-Friendly Health System-Participants count is inclusive of hospitals and practices that went on to be recognized as Age-Friendly Health Systems-Committed to Care Excellence*

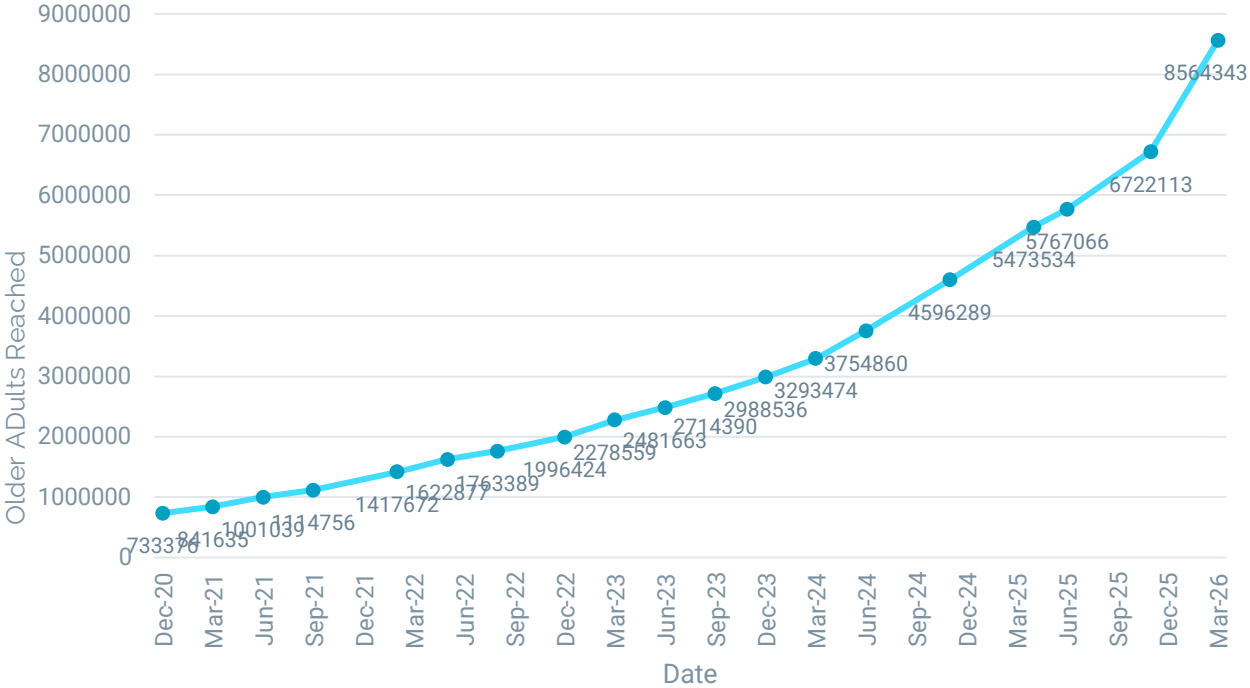
*Updated as of May 1, 2026*

# More than 8,560,000 older adults have been reached with 4Ms care

## As of March 2026



Cumulative Count of Older Adults Reached with the 4Ms (quarterly)



# Thank You

# Age-Friendly Recognition and DCA's Cognitive Health Assessment: How They Align

Mentation, What Matters, and Medication Management across both frameworks

## Age-Friendly Recognition

### Mentation

- Screen (Mini-Cog); assess if positive (SLUMS or MoCA)

### What Matters

- Ask What Matters at least annually; align care plan to goals

### Medication Management

- Screen 8 high-risk drug classes (benzos, opioids, anticholinergics, and others)
- Deprescribe, educate, or refer as appropriate

## Dementia Care Aware

### Mentation

- Cognitive Health Assessment (CHA): Cognitive screen using Mini-Cog, functional screen, caregiver assessment. Work up including additional assessments such as MoCA

### What Matters

- Advance Care Planning training module

### Medication Management

- Medication review embedded in CHA with focus on cognitive effects; deprescribing guidance in brain health plan



# Dementia Care Aware

# What Dementia Care Aware Offers

## Education and Training



- Cognitive assessment training
- Live and on demand dementia care curriculum
- Webinars and Podcasts

## Implementation Coaching



- Workflow consultation
- EHR tools
- Organization specific training and support

## Clinical Provider Warmline

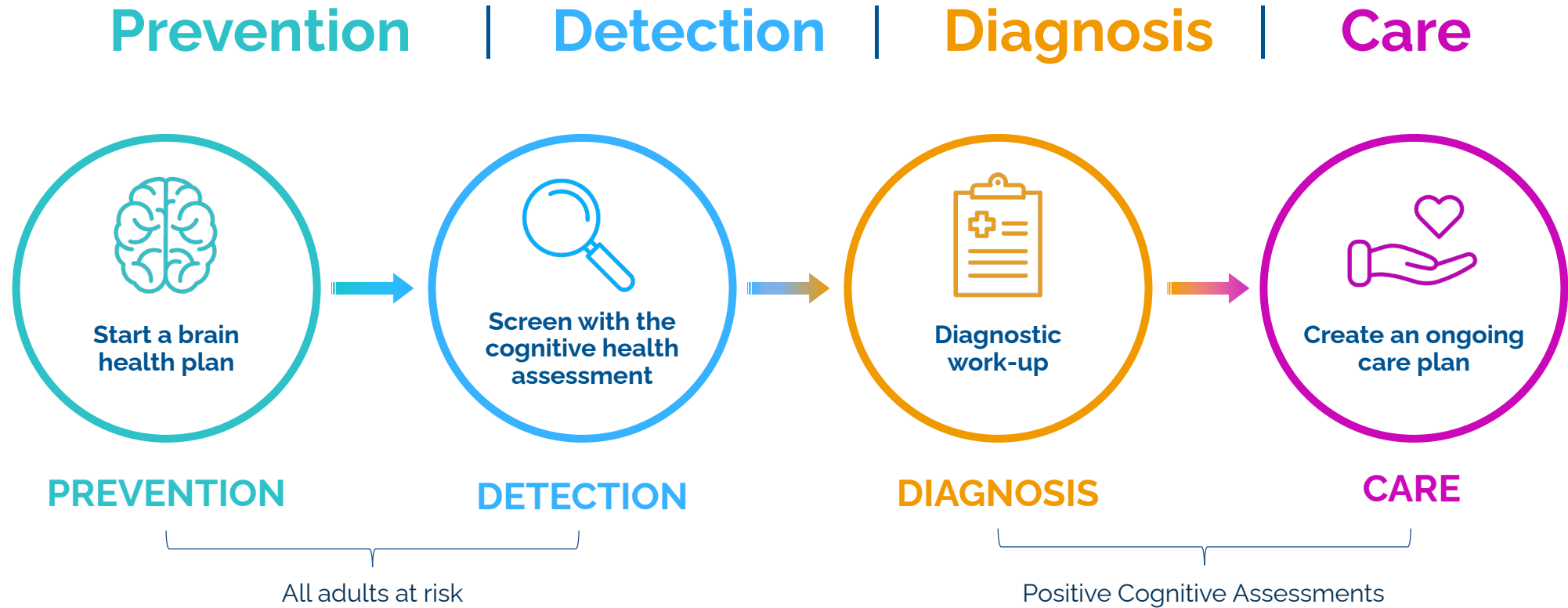


**1-800-933-1789**

A provider support and consultation service staffed by dementia experts

*DementiaCareAware.org    DCA@ucsf.edu*

# The Dementia Care Aware Clinical Pathway





# The Cognitive Health Assessment

# The Cognitive Health Assessment



- Annual screen
- A quick check on **cognitive** and **functional** symptoms and an assessment of the person's support system



- **The start** of a diagnostic assessment
- A jump start on a brain health plan

*Various team members can do all or parts, but it needs to be reviewed by the billing provider.*

# Screening for Dementia: The Cognitive Health Assessment

Part 1



**Take a Brief Patient History**

Part 2



**Use Screening Tools**

Part 3



**Document Care Partner Information**

**Goal:** screen patients 65 and older annually (who do not already have a diagnosis of dementia)

# Use Screening Tools. *You Have a Toolbox!*

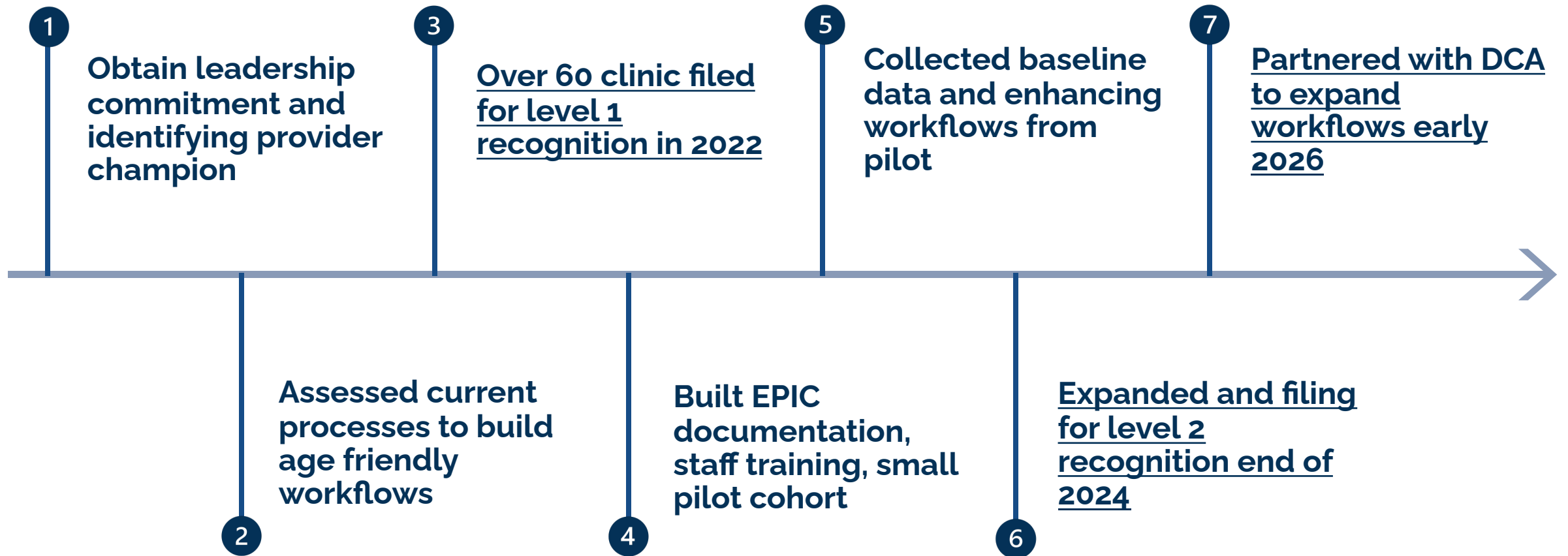
	Administered to the patient:	Administered to the care partner:
<b>Cognitive Screening Tools</b>	<p><a href="#">GP-COG</a>: Part 1: General Practitioner assessment of Cognition (for the patient)</p> <p><a href="#">Mini-Cog</a></p>	<p><a href="#">Short IQ-CODE</a>: Short Informant Questionnaire on Cognitive Decline in the Elderly</p> <p><a href="#">AD-8</a>: Eight-Item Informant Interview to Differentiate Aging and Dementia</p>
<b>Functional Screening Tools</b>	<p>ADLs/IADLs: Activities of Daily Living and Instrumental Activities of Daily Living</p>	<p><a href="#">GP-COG</a> Part 2: General Practitioner Assessment of Cognition (for the informant)</p> <p><a href="#">FAQ</a>: Functional Activities Questionnaire</p>



# LifeLong Medical Care: Case Study



# The Pathway to Age-Friendly Recognition and DCA Collaboration



# Discussion Questions

1. What did the journey to Age-Friendly certification look like for Over 60?
2. How did Over 60 implement the 4Ms? (training, workflow development, etc.)
3. What does expansion toward a full CHA and dementia care pathway look like now? (training, workflow development, etc.)
4. What were some of the key challenges, barriers, and successes you experienced through the Age-Friendly and DCA partnership?

# Becoming Age-Friendly

How Over 60 Clinic pursued and achieved Age-Friendly Health System recognition

- Over 60 clinic serves a predominantly older adult population with complex, multi-morbid care needs
- Implemented 4Ms as a part of age-friendly certification process **(example of how this was achieved)**
  - Include time it took to complete and lessons learned from the process
- Achieved recognition as an Age-Friendly Health System (Level 2) clinic, but understood that age-friendly certification was just the beginning



# Partnering with Dementia Care Aware to Expand Recognition

The intersection of Age-Friendly recognition and Dementia Care Aware at LifeLong Medical Care

- Why Lifelong finds value in conducting a CHA vs. screening alone, and how this strengthens Age-Friendly care and aligns with DCA
- Worked collaboratively to review and update workflows and dot phrases to add in functional assessment and next steps after a cognitive screen
- Held additional trainings to socialize screening to entire organization
- Planning case base learnings with over 60 to discuss workflows in practice
- Evaluating impact and outcomes together



# FREE TRAINING, SUPPORT & PROGRAM OFFERINGS

FREE  
CE/CME



Education and implementation support resources for dementia screening and care planning.

[DementiaCareAware.org](https://DementiaCareAware.org)  
[dca@ucsf.edu](mailto:dca@ucsf.edu)



Free 50-state tool developed to help patients and their caregivers navigate legal and financial planning.

[PlanForClarity.org](https://PlanForClarity.org)  
[peterselizabeth@uclawsf.edu](mailto:peterselizabeth@uclawsf.edu)



FREE  
CE/CME



A national training program that provides health care teams with the skills & confidence to include caregivers in a patient's care journey.

[CarePartners.ucsf.edu](https://CarePartners.ucsf.edu)  
[capct@ucsf.edu](mailto:capct@ucsf.edu)



QI project support for health systems and education and support groups for persons living with dementia and their caregivers.

[alz.org](https://alz.org)  
[avalenzuela@alz.org](mailto:avalenzuela@alz.org)

